



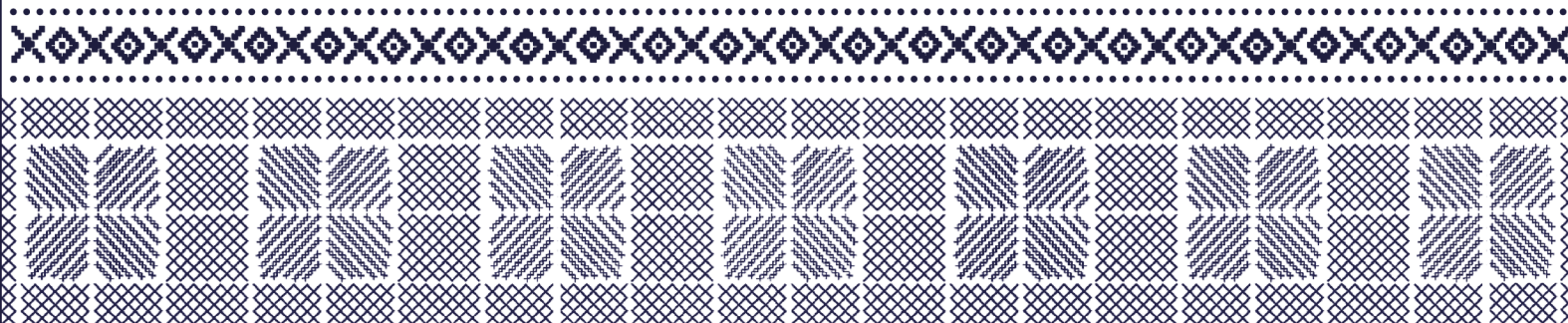
# **GUIDELINES AND PROCEDURES**

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**IN INITIATING THE DEVELOPMENT**

**AND IMPLEMENTATION**

**OF INTERNATIONAL PARTNERSHIP AGREEMENTS**





ATENEO  
INTERNATIONALIZATION  
FOR MINDANAO  
OFFICE

ATENEO DE DAVAO UNIVERSITY  
E. Jacinto St., 8016  
Davao City, Philippines

Tel No. +63 (82) 221-2411 local 8231  
Fax +63 (82) 226-4116

E-Mail: [international@addu.edu.ph](mailto:international@addu.edu.ph)  
\*[www.addu.edu.ph](http://www.addu.edu.ph)

## **Guidelines and Procedures in Initiating the Development and Implementation of International Partnership Agreements**

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### **I. PURPOSE AND SCOPE**

The following guidance is provided to assist the Ateneo de Davao University community in *initiating the development and implementation of international partnership agreements*. These agreements involve faculty and student exchanges, study abroad programs, collaborative research, outreach, and developmental projects, and other activities with organizations and higher education institutions in other parts of the world.

This document is also intended to aid the University in achieving uniformity and consistency in the processes of development and implementation of international agreements. The procedures stated here are also meant to help in the formalization and documentation of such agreements.

The forging of international engagements is an important strategic priority of Ateneo de Davao University (*Goal 2, Outcome 13 of the 2020-2025 Strategic Plan*). As such, international agreements should be pursued in alignment with the University's Mission, Vision, and Strategic Plan. Abiding by a process that formalizes collaboration and commitment from stakeholders of international agreements would therefore reinforce the achievement of said strategic outcome.

The following are the priorities of the University on international engagements and initiatives:

Priority 1: Promote Internationalization of the Curriculum & Faculty Development Activities

Priority 2: Increase International Research

Priority 3: Expand International Advocacy/Engagement/Outreach Activities

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### **II. OFFICE IN CHARGE OF INTERNATIONAL LINKAGES**

The *Ateneo Internationalization for Mindanao (AIM)* office aims to centralize the internationalization mechanism of the Ateneo de Davao University. This includes devising a system that will aid in fostering uniformity and consistency in the University's processing, implementation, and documentation of international partnership agreements. AIM is also set to oversee the observance of protocols relating to the timely and efficient realization of partnership agreements and other international projects.

AIM centers its operations and programs to serve Mindanao, catering to the University's vision of being a Filipino University for Mindanao and its mission of forming graduates who are leaders *sui generis* for Mindanao. AIM's service to Mindanao is therefore crucial even as we establish a sense of "cultural understanding and friendship with our Asian neighbors" (Strategic Goal 2, Outcome 13).

Among its responsibilities is to develop programs that foster the internationalization of ADDU's curriculum, the increase of international research and faculty development activities, and the extension of engagements and outreach activities to our neighbors in Asia. AIM is to play an active role in maximizing the University's international linkages, and in pushing for bilateral and/or multilateral support in programs and projects of academic and social development.

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## II. TYPES OF INTERNATIONAL LINKAGES

### 1. ACADEMIC PROGRAMS

Agreements that fall under this category must provide details on funding available, travel costs, provision of accommodation or immersion facilities, salary/remuneration, reporting, and other possible areas of responsibility while implementing the program.

#### *Student Exchange Programs*

These are academic programs that allow for a bilateral study-abroad mobility between Ateneo de Davao and a partner higher education institution that is based in a foreign country. Foreign exchange programs provide students with an opportunity to study in a different country and environment, experiencing a different culture first hand as part of his/her academic program. International exchange programs are also effective to challenge students to develop a global perspective. The term "exchange" implies the bilateral exchange where the partner university accepts a student from ADDU, and vice versa.

Implementation of the student exchange program will strictly follow the implementing guidelines and requirements of the specific Memorandum of Understanding (MOU) and Program Specific Agreement (PSA) for the student exchange program.

#### *Faculty Exchange Programs*

A program in which individuals holding at least a Master's Degree and affiliated with degree-granting, research or outreach-based units in ADDU can spend at least one semester working in research, education, outreach, teaching and innovation at a foreign institution to experience its culture and best practices. Foreign-based faculty members are also given the opportunity to spend time in ADDU to engage in teaching and research activities with any degree and non-degree granting units.

Implementation of the faculty exchange program will strictly follow the guidelines and requirements of the specific Memorandum of Understanding (MOU) and Program Specific Agreement (PSA) for the student exchange program faculty exchange program.

### ***Short-Term Global Experiential Learning***

This refers to international experiential learning opportunities for students and faculty. Short-term programs can range from week-long programs conducted during breaks in conjunction with a single course, to three- or eight-week programs that can involve homestays, travel to multiple sites, and service or research experiences. Many short-term programs include several or many of these elements.

Implementation of the short-term study abroad program will strictly follow the guidelines and requirements of the specific Memorandum of Understanding (MOU) and Program Specific Agreement (PSA).

### ***International Learning Sessions***

The Ateneo de Davao University has an exceptional network of partners who are esteemed scholars and masters in their respective academic fields. Departments are encouraged to tap into this network and invite people as guest instructors to lead International Learning Sessions about various topics and areas of engagement. Learning modules are usually comprehensive and a meticulous survey of a specific topic, championing the specializations of the guest speaker.

### ***Global Internship Programs***

This is a program where students are given global internship opportunities that are creditable as academic units in their respective schools. This is in collaboration with local and international institutions that are open to mentor and take in interns, and whose operations are service-based and aligned with ADDU's advocacies for Mindanao. Students are placed in project-based or research internships abroad to build a strong resume, to experience foreign work cultures firsthand, and to build a global network to support their professional growth. This program seeks to promote understanding and develop quality relationships between the Philippines and other countries. Students will be selected through an application and interview process.

## **2. RESEARCH AND DEVELOPMENT PROGRAMS**

Agreements that fall under this category must provide details on the specific area of research, funding, the terms and conditions of collaboration, and the mode of reporting or expected research outcomes.

### ***Collaborative/Joint Research Projects***

The University encourages and supports researchers to foster collaboration that will empower their studies. Any research that has international partnership implications must be formalized by being subject to an MOU or a Program-Specific Agreement (PSA). This allows the University to better identify its counterpart in terms of supporting its researchers.

#### ***Benchmarking Opportunities***

Proposals for foreign benchmarking must be properly drafted, indicating the rationale and the intended output of such activity. Benchmarking is one way to bolster quality assurance and to support the research of fresh approaches to program and faculty development. They should therefore account for a comprehensive report, indicative of next steps and other benchmarking applications.

#### ***Data-sharing / Information Exchange***

Data sharing and information exchange are subject to data privacy and intellectual property protocols of the University. Departments are encouraged to empower their researches by cross-referencing with other international sources. Such type of research transaction is valued by the University, and should therefore be supported by an agreement of exchange and data-sharing, stating the specifications of scope and intended outcome.

### **3. CONFERENCES AND OTHER DIALOGUE-BASED EVENTS**

Proposals that fall under this category must describe the nature of the conference and provide details of invitation should the proposal be attendance in a conference. Agreements in this category must indicate respective responsibilities between institutions that are working together to hold a joint conference.

#### ***Attendance in Conferences***

Opportunities of attendance in international conferences among faculty and staff and even students are numerous. International conferences are great opportunities to listen to different points of view and learn new ideas and trends in various fields of research and academics. They also provide new techniques, new approaches to instruction, data that is yet to be published, and opportunities to interact with investigators with innovative concepts to share. It would therefore require a proper proposal of attendance, endorsed and approved by the Academic, Research, or Engagement offices, to be verified by AIM and approved by the Office of the President.

#### ***Partnership in Conferences***

Ateneo de Davao University is often sought out to be a partner for organizing conferences. These types of partnerships are subject to a Memorandum of

Understanding (MOU) that specifies secretariat responsibilities, logistical commitments, and funding counterparts among the stakeholders involved.

#### **4. OUTREACH AND SERVICE-BASED PROGRAMS**

Agreements that fall under this category must indicate the scope of collaboration and the specific responsibilities that are indicative of implementing outreach and service-based programs.

##### ***Participation in and/or Support of Outreach/Volunteer Programs***

International outreach and service-based programs (like the St. Aloysius Gonzaga Institute of Higher Studies “SAG-IHS” in Myanmar) are usually supported by the University via a commitment to regularly send volunteers in foreign areas of service and immersion. International linkages of this nature require a signing of an MOU.

##### ***Organization and Implementation of Outreach/Volunteer Programs***

In projects that require the University to organize a steering committee or a group of researchers to help solidify the foundations of an outreach program, the premises and implications of partnership must be well stated and approved via a PSA. Such is the case for projects like the specifics of curriculum development for the Xavier Learning Community (XLC) Project in Thailand.

#### **5. FUNDING AND SPONSORSHIP**

Agreements that fall under this category must indicate the nature of sponsorship and/or the mechanisms and conditions of funding.

##### ***International Resource Generation***

Resource generation that has international implications in terms of funding and sponsorship are subject to the approval of the University President. MOUs and contracts are to be properly drafted and undergo due process of notarization. AIM’s main participation in these cases would be to make sure the MOU and contracts are at hand and implementing offices are updated status-wise.

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## **IV. MECHANICS FOR INITIATING NEW PARTNERSHIPS**

### ***STEP 1: Identify the level of your partnership and its corresponding requirements***

#### **LEVEL 1: Activity-based partnership**

- Letter of Intent (LOI)

Draft a letter of intent addressed to the University President with the following details:

- statement of intent
- areas of potential collaboration
- context
- source of budget for the activity
- effective date of letter
- intended area of participation/intervention for the Office of the President (if applicable)
- with signatories (duly endorsed and recommended by superior/unit head)

### **LEVEL 2: Agreement-specific partnerships**

- Submit a cover letter addressed to the University President about the agreement to be signed, duly endorsed and recommended by the superior/unit head. The cover letter must include the same details as the Letter of Intent described above.
- Attach the draft Memorandum of Understanding (MOU) with the cover letter. (*Sample MOU is an annex to this document*)
  - make sure that the draft MOU is checked by the University Legal Counsel
  - if applicable, the draft is also checked by the VP for Finance and Treasurer, and/or by the EVP.

### **LEVEL 3: Program and implementation-based partnerships**

- Submit a cover letter addressed to the University President about the contract to be signed, duly endorsed and recommended by the superior/unit head. The cover letter must include the same details as the Letter of Intent described above.
- Attach the draft Program-Specific Agreements (PSAs) with the cover letter. (*Sample PSA is an annex to this document*)

This document is used to spell out in detail, specific areas and terms of collaboration including the roles, responsibilities, activities and contributions of the respective parties. Such an agreement could elaborate on the details of a student or faculty mobility program, a collaborative research effort, community engagement projects and other activities with organizations and higher education institutions in other parts of the world.

PSA's will be developed within the scope or umbrella of a general MOU. These agreements should be signed by the University President, and witnessed by the school dean, center/institute director and/or the department chair.

- make sure that the draft PSA is checked by the University Legal Counsel
- if applicable, the draft is also checked by the VP for Finance and Treasurer, and/or by the EVP.

**STEP 2: Submit the International Partnership Approval Form (IPAF), along with the attachment of the corresponding level of partnership to the AIM Office**

- The International Partnership Approval Form (IPAF) will serve as an approval, routing, and documentation form. The form requires the following details:
  - title of agreement/project
  - type of international linkage

- details on stakeholders
- duration of partnership
- budget source and
- description of collaboration
- Attach one of the following:
  - Letter of Intent (for level 1 partnership)
  - Draft MOU (for level 2 partnership)
  - Program-Specific Agreement (PSA) (for level 3 partnership)

### **STEP 3: Approval of Agreements**

- For Level 1 Partnerships
  - The IPAF will be signed by the Director of the Ateneo Internationalization for Mindanao (AIM) Office upon approval.
  - The IPAF and the Letter of Intent will be given to the University President for his approval.
  - The approved and signed copy of the IPAF will be given to the Unit/Department who submitted it, and another copy will be kept on file at AIM and the President's Office.
- For Level 2 and Level 3 partnerships
  - The IPAF and the MOU/PSA will be reviewed by the Director of the Ateneo Internationalization for Mindanao (AIM) Office.
  - Following the review, the sponsoring office/institute Director, in coordination with the AIM, makes the necessary revisions to the MOU/PSA.
  - The MOU/PSA will be sent to the University Legal Counsel for approval.
  - The final version of the contract is approved by the AIM Director and the sponsoring office/institute/department Director. Six (6) copies of the contract will be printed.
  - The documents (IPAF and MOU/PSA) will be submitted along with an endorsement letter of the AIM Director to the University President for his signature.
  - AIM coordinates with the sponsoring office/institute/department for the transmittal of the approved copies to the partner institution(s) for their signatures.
  - AIM coordinates with the sponsoring office/institute/department for the notarization of the signed MOU/PSA in Davao City.
  - AIM secures the distribution of copies of the notarized agreement: a copy for the sponsoring office/institute/department, the Office of the President, and the AIM Office.

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## V. IMPORTANT AGREEMENT CONSIDERATIONS

### **Financial Commitments**

To the extent that resources are committed, agreements must contain language clearly stating that any financial commitments are subject to availability of funds and are negotiated in each case. It is advisable that negotiations occur annually, and if not stated within the agreement, under separate cover.

### **Language**

International Partnership Agreements should be executed in the official languages of the cooperating institutions unless agreed otherwise. Two original copies per language should be signed. It should also be agreed upon by both parties that in case of conflict in the wordings of the agreement, the English version of the document shall be executed.

### **Legal Settlement/Adjudication**

Part of the agreement must be a provision on legal settlement stipulating the place where legal cases will be adjudicated. This may be discussed with the partner institution, but it is the University's position that legal cases arising from breach of agreements must be settled in the Philippines.

### **Agreement Renewal**

It is recommended that the renewal process be initiated at least five (5) months prior to expiration of the agreement to allow sufficient time to negotiate, and finalize the renewal document. In considering the renewal of a cooperation agreement, the parties should assess effectiveness and progress toward achieving the objectives of the original agreement. Only active, vibrant agreements that are achieving stated objectives, and have concrete plans for future collaboration, should be continued.

### **Agreement Termination**

All agreements should contain a termination clause giving either party the right to terminate the agreement within a specified time frame. The agreements should also specify the process by which programs will be ended with the least amount of disruption in the event of a termination. Upon termination of an agreement, all relevant offices reflected on the International Partnership Approval Form will be notified in writing by the President or by the head of the sponsoring department, institute, center or school.

### **Agreement Amendment**

All agreements should contain a Statement of Alteration giving both parties the option to amend an agreement. Amending agreements should be a mutual decision. AIM, in coordination with the sponsoring office, will facilitate agreement amendments in writing.

### **Records Management**

The original documents (one in each official language per partner institution) shall be retained in a central file at the Ateneo Internationalization for Mindanao Office on behalf of Ateneo de Davao University.

The AIM maintains an International Partnerships Database. The database tracks and manages ADDU agreements for the purpose of providing data for planning and communication. The database also maintains and helps coordinate information on relationships with international partners; inform inter- and intra-collegiate partnerships; facilitate and develop multidisciplinary teams both locally and globally; and assist ADDU in achieving its goal of strategic internationalization.

#### **Agreements Originated by External Entities and Other Institutions**

The above guidance applies to agreements initiated by ADDU. However, when presented with agreement documents from abroad, the university will work with such proposals while ensuring that the final content appropriately reflects ADDU mission, interests, and priorities.

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## **VI. ANNEXES**

1. International Partnerships and Activities Approval Form (IPAAF)
2. Sample Letter of Intent
3. Sample Memorandum of Understanding (Template)
4. Sample Memorandum of Agreement (Template)
5. Sample Visiting Scholars Agreement
6. Checklist for International Partnership and Collaboration Agreements